



# *Matrix* Basic User Manual



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### INTRODUCTION

The CRMLS Matrix Platform is the industry's top rated MLS platform offering an ultra-modern and flexible environment. This manual will give you a basic introduction to the Matrix and guide you through performing basic searches, viewing search results, and printing and emailing listings.

### MINIMUM SYSTEM REQUIREMENTS

To use the CRMLS Matrix Platform, your system should meet these minimum requirements:

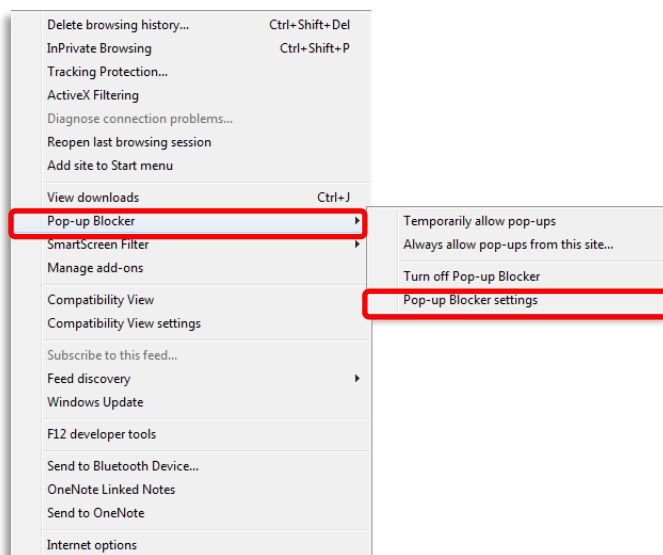
- Operating System:** Windows XP, Windows Vista, Windows 7, Windows 8 or Mac OS X
- Internet Connection:** 56k Modem (DSL, Cable Modem, or other high speed internet access recommended)
- Web Browser:** [Internet Explorer 7.0 or later](#), [Firefox](#), [Safari](#), or [Chrome](#)

To find out if the browser you are using is up to date, please visit the following website: <http://whatbrowser.org/>

## DISABLING POP-UP BLOCKERS

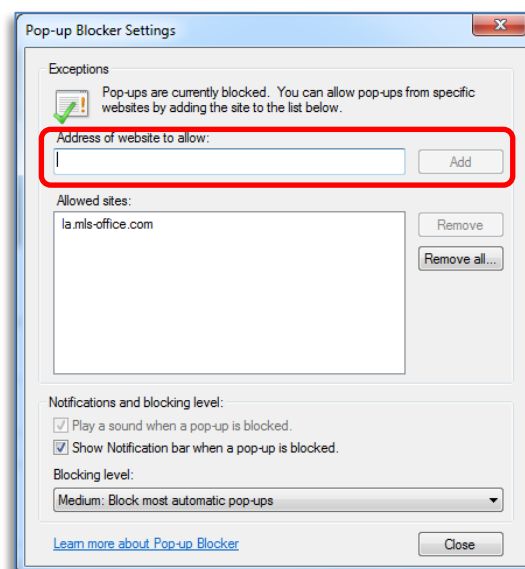
Your computer may have an Internet browser or security software that blocks Internet pop-ups. CRMLS products utilize help screens and other features that may be blocked by some pop-up blockers. Follow the steps below to allow pop-ups from CRMLS products in Internet Explorer.

1. In Internet Explorer, select **Tools → Pop-up Blocker → Pop-up Blocker Settings**



2. Add the following websites to the “Allowed Sites” list:

- <http://crmls.org> (CRMLS Website)
- <http://www.mrmmlsmatrix.com> (CRMLS Matrix)
- <http://realist2.firstamres.com> (Realist Tax)
- <http://tm.marketlinx.com> (Smart Trac/Smart Fax)



### Note:

For information on allowing pop-ups from CRMLS products in other Internet browsers or security software, refer to your application’s documentation.

### ACCESSING THE CRMLS MATRIX PLATFORM

Follow the steps below to access the CRMLS Matrix platform from our website.

1. Open your web browser and navigate to <http://www.crmls.org>
2. Click **CRMLS Matrix** button.



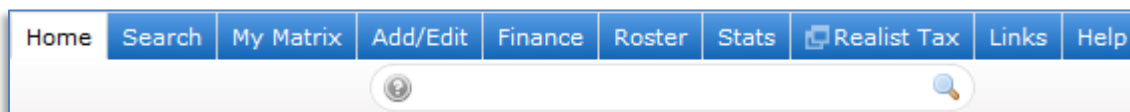
3. Enter your **User ID** and **Password** in the SCOUT Login screen and click **Login**.



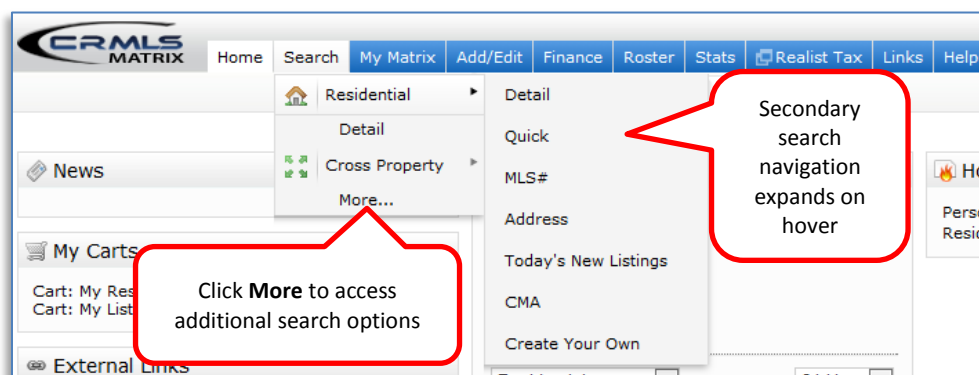
4. After successful login in, you will see the CRMLS Matrix home screen which we will discuss in the next section.

## CRMLS MATRIX PLATFORM NAVIGATION OVERVIEW

The CRMLS Matrix platform's navigation menu bar is geared towards reducing the number of clicks required for navigation throughout Matrix.



When you hover over certain tabs, you will see a drop down menu with additional navigation options.

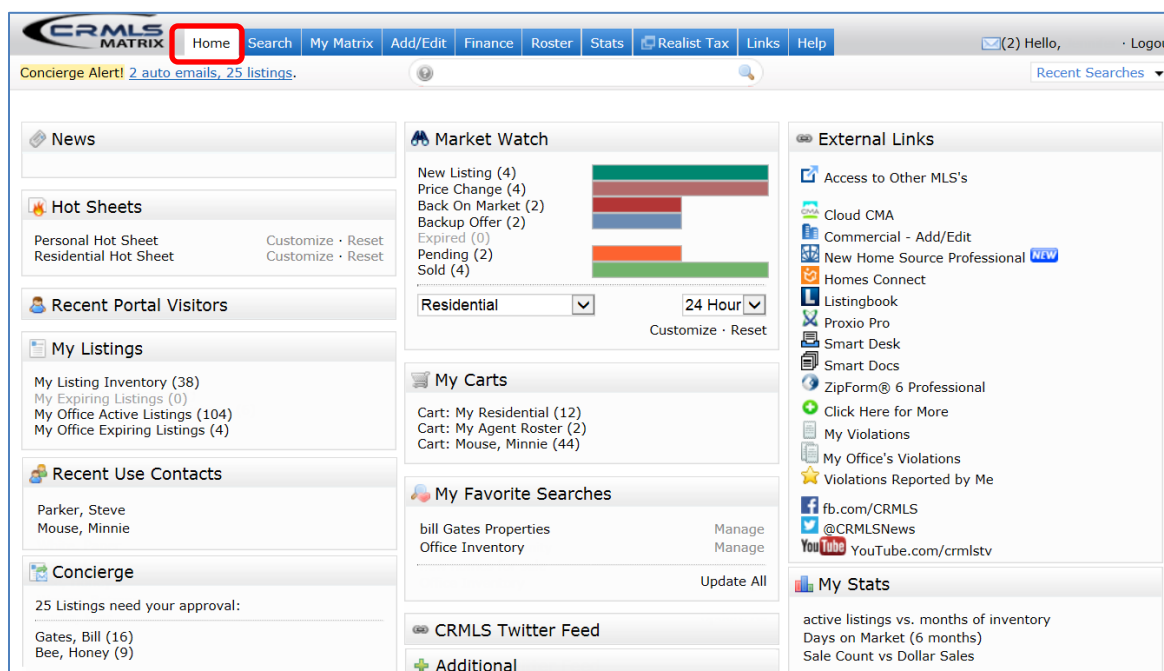


### THE 10 TABS OF MATRIX:

1. **Home Tab** includes Matrix news, Market Watch, Hot Sheets, Favorite Searches, and various other widgets that allow you to access different features.
2. **Search Tab** allows you to access and search for listings in Residential, Residential Income, Residential Lease, Land/Lot, Mobile, Commercial, Cross Property, Open House, and Property History.
3. **My Matrix tab** contains your Contacts, Auto Emails, Saved Searches, Sent Emails, CMA's, Watches Listings, My Listings, Settings and Portal Greeting set up.
4. **Add/Edit Tab** includes the ability to add/modify listings, Open Houses, and the option to change your personal contact information.
5. **Finance Tab** offers the ability to calculate net sheets and utilize other personal financial calculators.
6. **Roster Tab** allows you to search for other agents and offices in the Matrix system.
7. **Stats Tab** allows you to pull statistical reports based on MLS data for various property types.
8. **Realist Tax Tab** allows you to search property tax record information and compile farm packages.
9. **Links Tab** contains links to additional products and services that you can access.
10. **Help Tab** contains the data integrity standards, photo policy, FAQ, reciprocal passwords, links to training classes, manuals, quick reference guides, video tutorials, and other helpful tools.

## HOME TAB

The **Home** tab gives you quick access to everyday tasks and is the first tab you see when you log into Matrix.

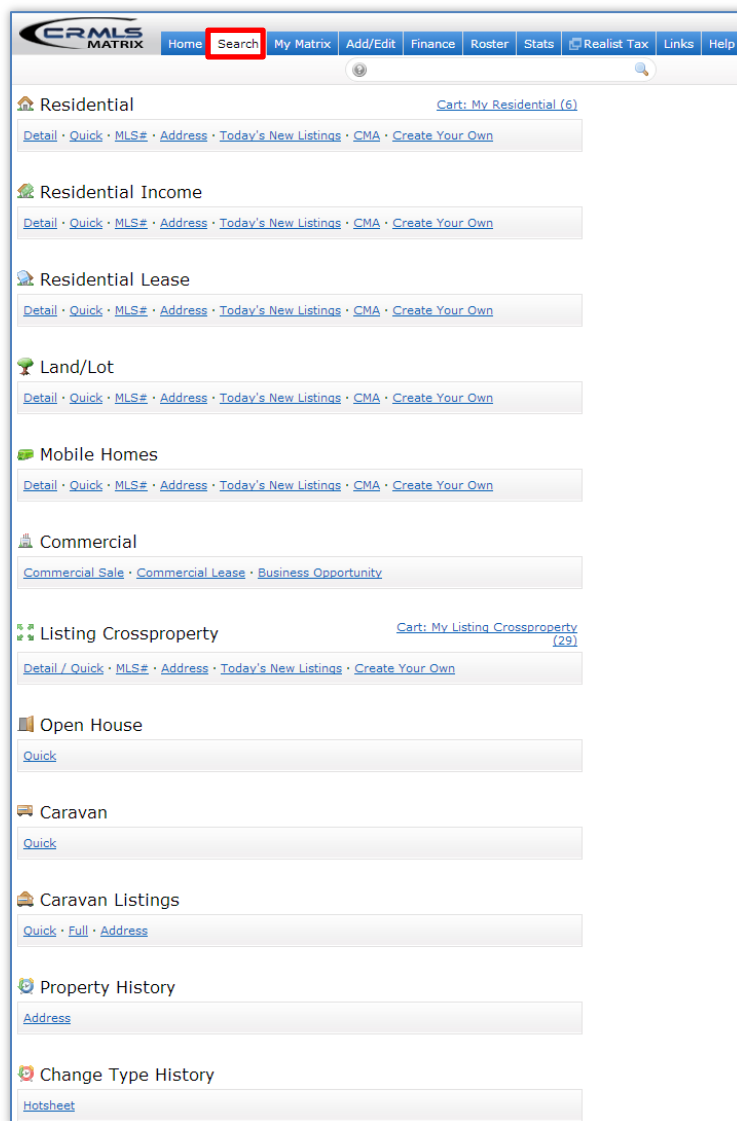


The Home tab gives you quick access to the following items:

- The **News** widget displays current updates, releases, and important information.
- The **Market Watch** widget displays changes in the market place by property type.
- The **Hot Sheets** widget is customizable and displays the latest market changes.
- The **My Carts** widget gives you access to view listings you have added to each property cart.
- The **My Favorite Searches** widget displays up to 12 of your saved searches.
- The **External Links** widget gives you access to additional CRMLS products and other MLS systems such as; Sandicor MLS, MLSListings, Inc..
- The **My Listings** widget displays your current listings and any listings that will be expiring within two weeks.
- The **My Stats** widget allows you to access your customized statistical reports.
- The **Recent Portal Visitors** widget displays a list of clients that have viewed listings sent to them on your behalf via the Auto Email feature in the Matrix.
- The **Recent Use Contacts** widget displays a list of your most recently clients in the Matrix.
- The **Additional** widget will store all the widgets not in use on your Home tab.

## SEARCH TAB

The **Search** tab allows you to search for listings by property type, including Residential, Residential Income, Residential Lease, Land/Lot, Mobile Homes, Commercial, and Listing Cross Property. You can also search for Open Houses, Caravans, Property History, and Change Type History.



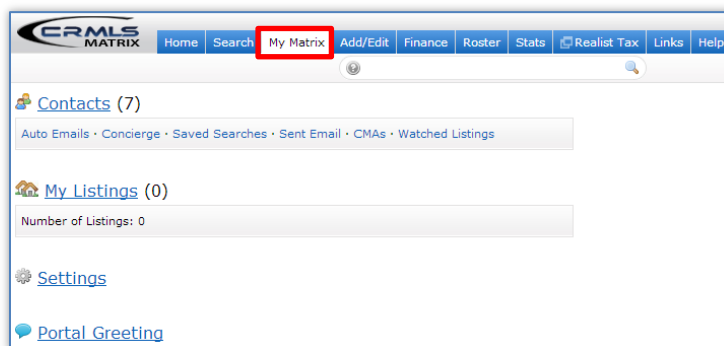
### Note:

To input a Listing for Commercial/Industrial properties, Commercial Leases, or Business Opportunities, use the **CARETS Commercial** system. You can access CARETS Commercial from the **External Links** widget on the **Matrix Home** tab.



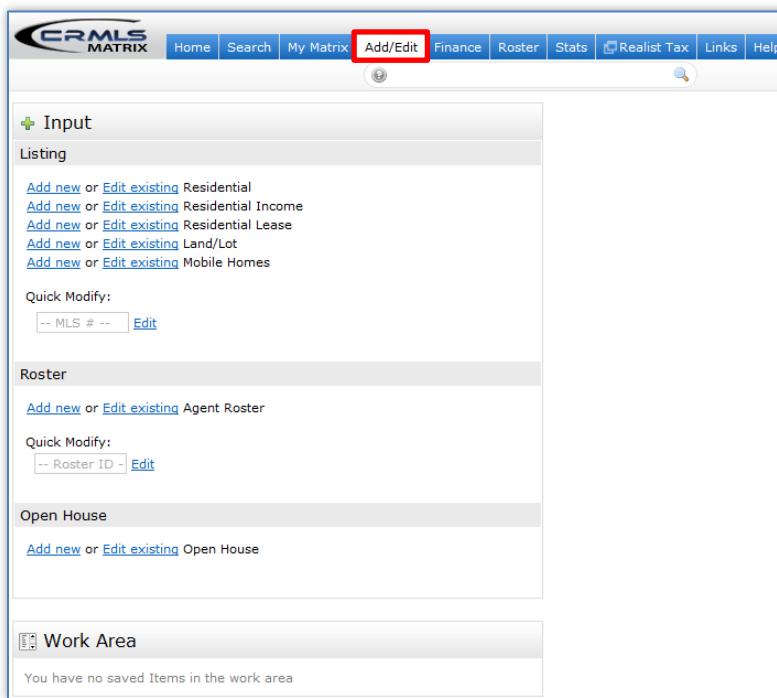
## MY MATRIX TAB

The **My Matrix** tab allows you to manage your contacts, Auto Emails, Concierge, Saved Searches, access Sent Email's, Create or Update CMA's, and View your Watched Listings. In addition, you can manage your listings, update your account settings, and manage your Portal Greeting.



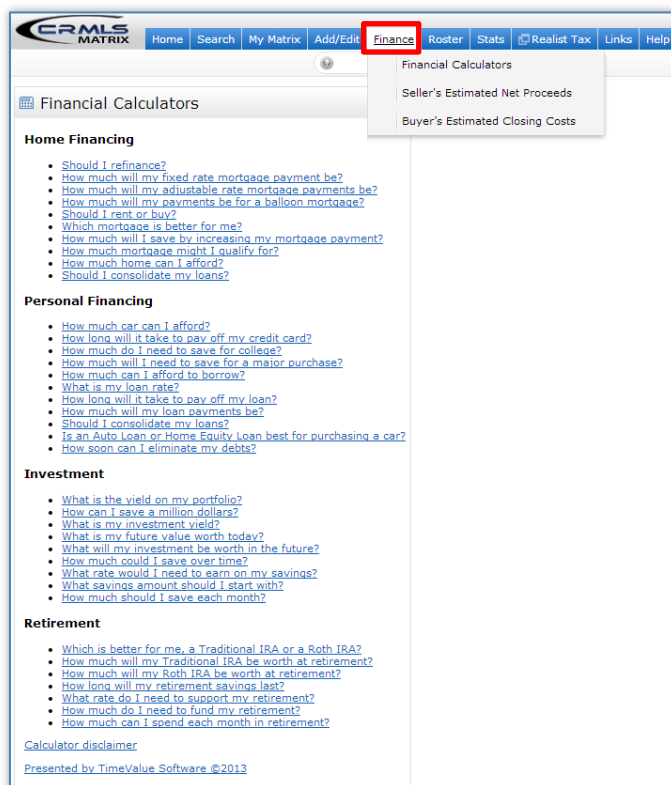
## ADD/EDIT TAB

The **Add/Edit** tab allows you to add listings, modify listings and open house entries, and retrieve partially saved listings from your **Work Area**. You can also edit your contact (roster) information (see the ["Updating Your Contact Information"](#) section for more details).



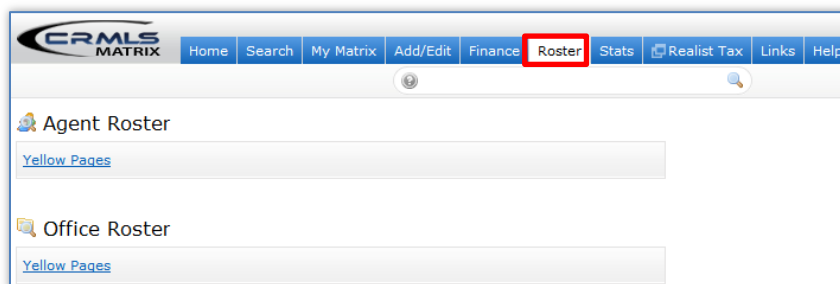
## FINANCE TAB

The **Finance** tab contains various home financing, personal financing, investment, and retirement calculators. In addition, hovering your mouse over the tab provides access to Buyers and Sellers, net sheets.



## ROSTER TAB

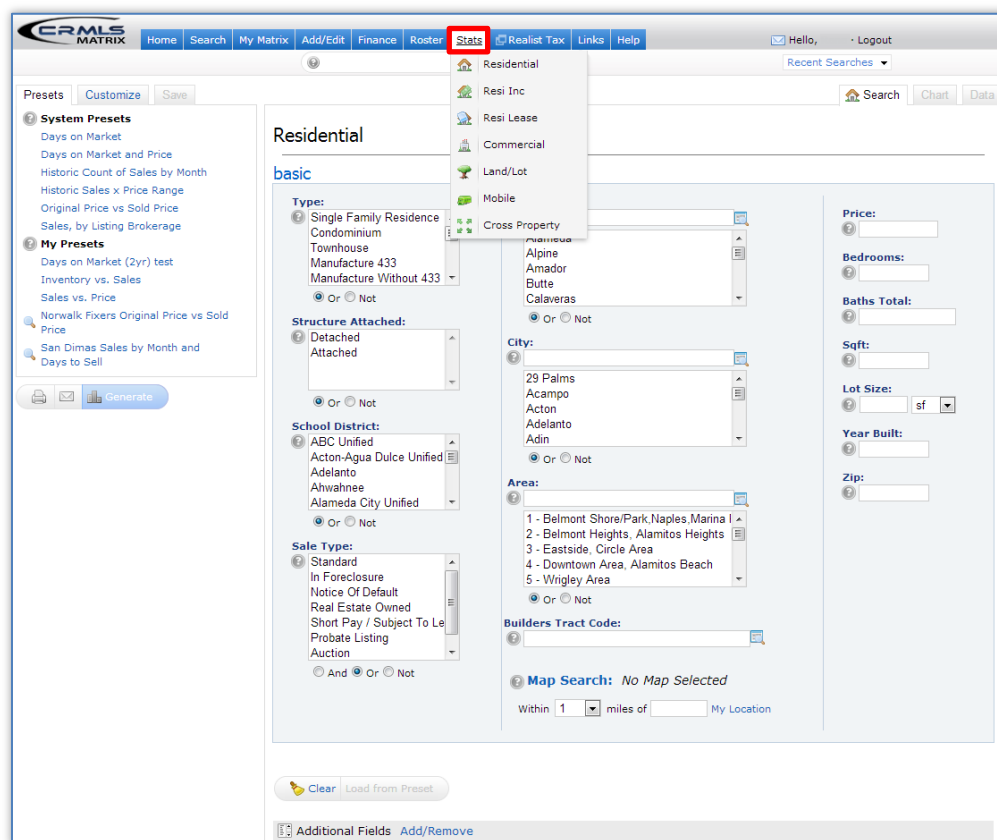
The **Roster** tab allows you to search for agents and offices in Matrix.



## STATISTICS TAB

The **Stats** (Statistics) tab allows you to analyze market trends and activity based on property type such as Residential, Residential Income, Residential Lease, Commercial, Land/Lot, Mobile Homes, and Cross property.

You can create statistical charts and graphs, and export statistical data. System presets allow you to quickly generate standard charts and graphs, or customize them with your own parameters to create a higher level view of the market.



The screenshot shows the CRMLS Matrix application interface. The top navigation bar includes tabs for Home, Search, My Matrix, Add/Edit, Finance, Roster, **Stats** (highlighted with a red box), Realist Tax, Links, and Help. The user is logged in as 'Hello, [Name]' and can click 'Logout'.

On the left, there are two sections: 'Presets' and 'Customize'. Under 'Presets', there are 'System Presets' (Days on Market, Days on Market and Price, Historic Count of Sales by Month, Historic Sales x Price Range, Original Price vs Sold Price, Sales, by Listing Brokerage) and 'My Presets' (Days on Market (2yr) test, Inventory vs. Sales, Sales vs. Price, Norwalk Fixers Original Price vs Sold Price, San Dimas Sales by Month and Days to Sell). A 'Generate' button is at the bottom of this section.

The main content area is titled 'Residential' and 'basic'. It contains several dropdown menus and checkboxes for filtering data:

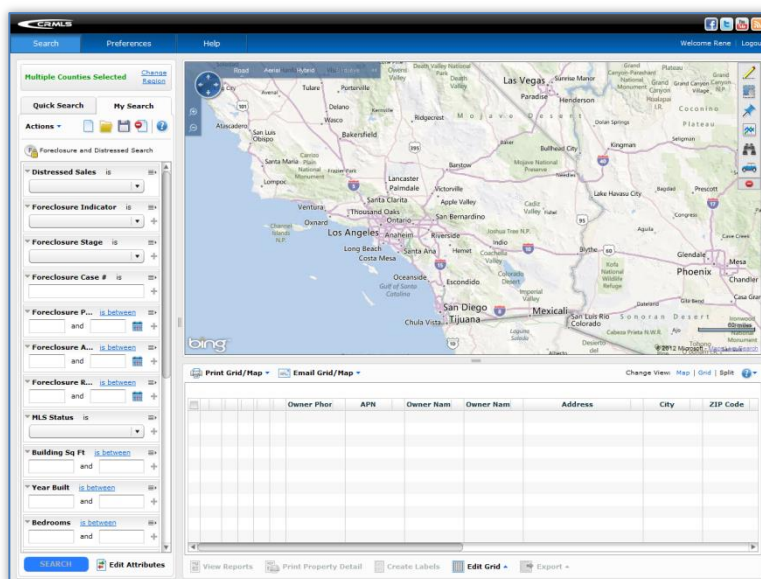
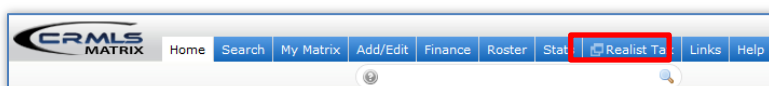
- Type:** Single Family Residence, Condominium, Townhouse, Manufacture 433, Manufacture Without 433. Radio buttons for 'Or' and 'Not'.
- Structure Attached:** Detached, Attached. Radio buttons for 'Or' and 'Not'.
- School District:** ABC Unified, Acton-Agua Dulce Unified, Adelanto, Ahwahnee, Alameda City Unified. Radio buttons for 'Or' and 'Not'.
- Sale Type:** Standard, In Foreclosure, Notice Of Default, Real Estate Owned, Short Pay / Subject To Le, Probate Listing, Auction. Radio buttons for 'And', 'Or', and 'Not'.
- City:** 29 Palms, Acampo, Acton, Adelanto, Adin. Radio buttons for 'Or' and 'Not'.
- Area:** 1 - Belmont Shore/Park Naples Marina, 2 - Belmont Heights, Alamitos Heights, 3 - Eastside, Circle Area, 4 - Downtown Area, Alamitos Beach, 5 - Wrigley Area. Radio buttons for 'Or' and 'Not'.
- Builders Tract Code:** A text input field.
- Map Search:** No Map Selected. A dropdown for 'Within' (set to 1) and a text input for 'miles of', followed by a 'My Location' link.

On the right side, there are input fields for 'Price:', 'Bedrooms:', 'Baths Total:', 'Sqft:', 'Lot Size:' (with a unit dropdown set to 'sf'), 'Year Built:', and 'Zip:'.

At the bottom, there is a 'Clear' button, a 'Load from Preset' button, and an 'Additional Fields Add/Remove' section.

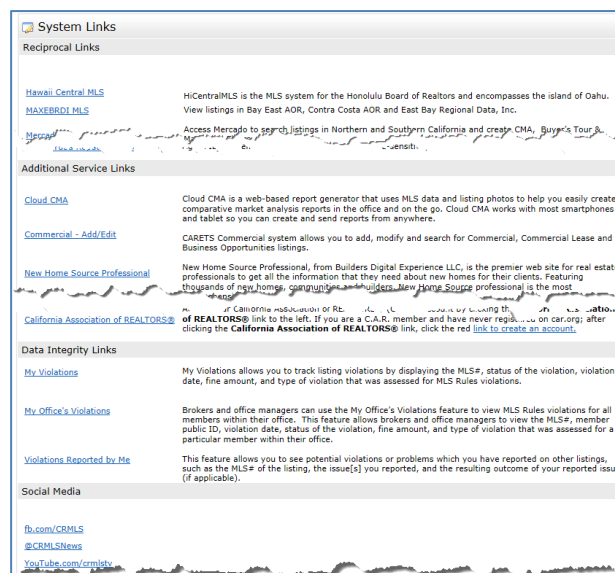
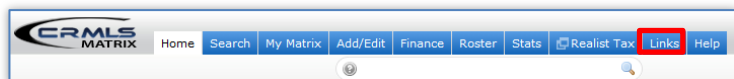
## REALIST TAX TAB

The **Realist Tax** tab allows you to access an integrated tax database that combines public records such as notice of defaults and trustee sales, CRMLS listing data, maps, and market data in a single research tool. Realist Tax covers all counties in California and is updated frequently.



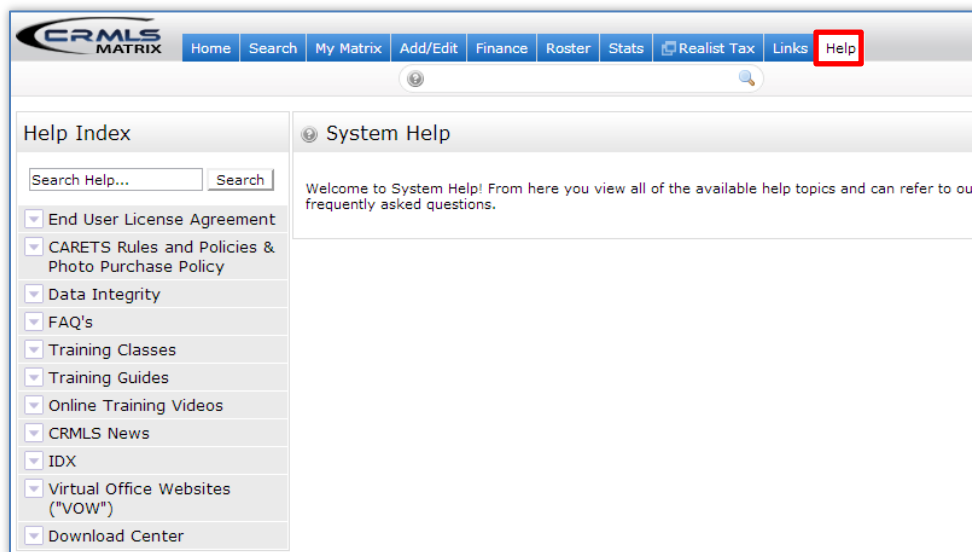
## LINKS TAB

The **Links** tab allows you to access additional California Regional MLS products and services. For more information on the products and services you receive as part of your membership, please contact your Local Association/Board of Realtors®.



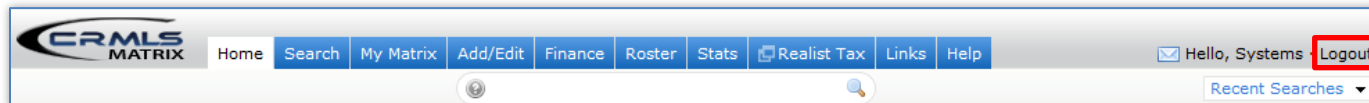
### HELP TAB

The **Help** tab contains links to helpful information such as CARETS rules and policies, frequently asked questions, reciprocal passwords, training class schedules, training guides, online training videos, CRMLS news, IDX solutions and policy, virtual office websites (VOW) rules and policy, and the download center.



### LOGOUT LINK

When you are finished working in Matrix, click the **Logout** link to sign out.

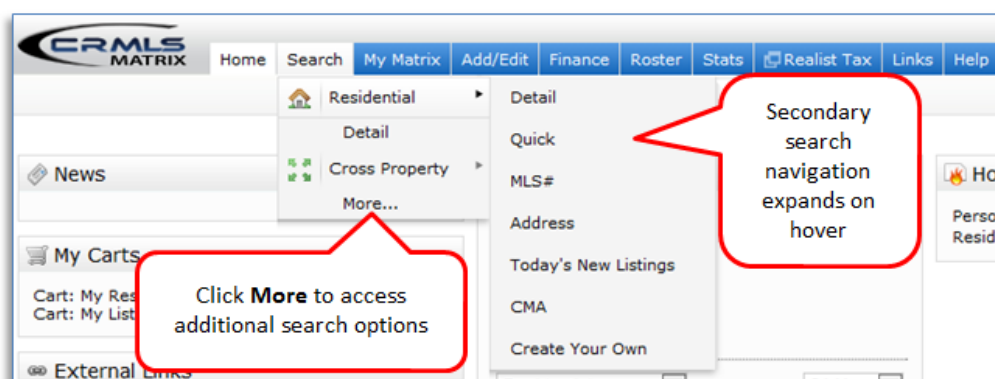


## SEARCHING FOR LISTINGS

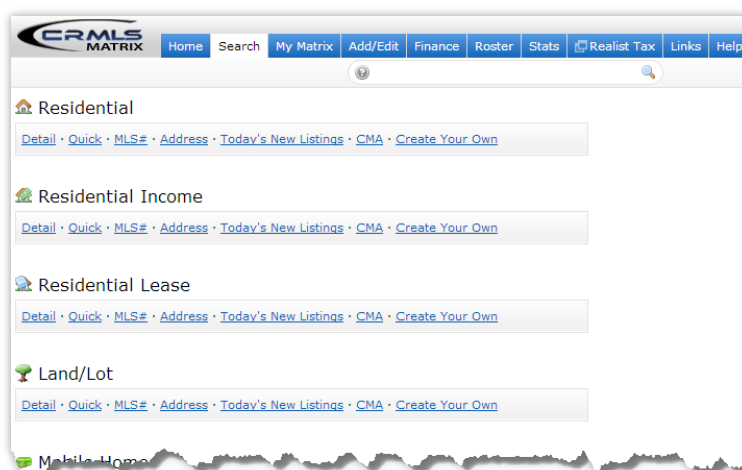
### BASIC SEARCH

Follow the steps below to perform a search for listings. This example will guide you through performing a basic Residential search, however, the steps for performing a Residential Income, Residential Lease, Land/Lot, Mobile Home, Commercial, or Crossproperty search are similar.

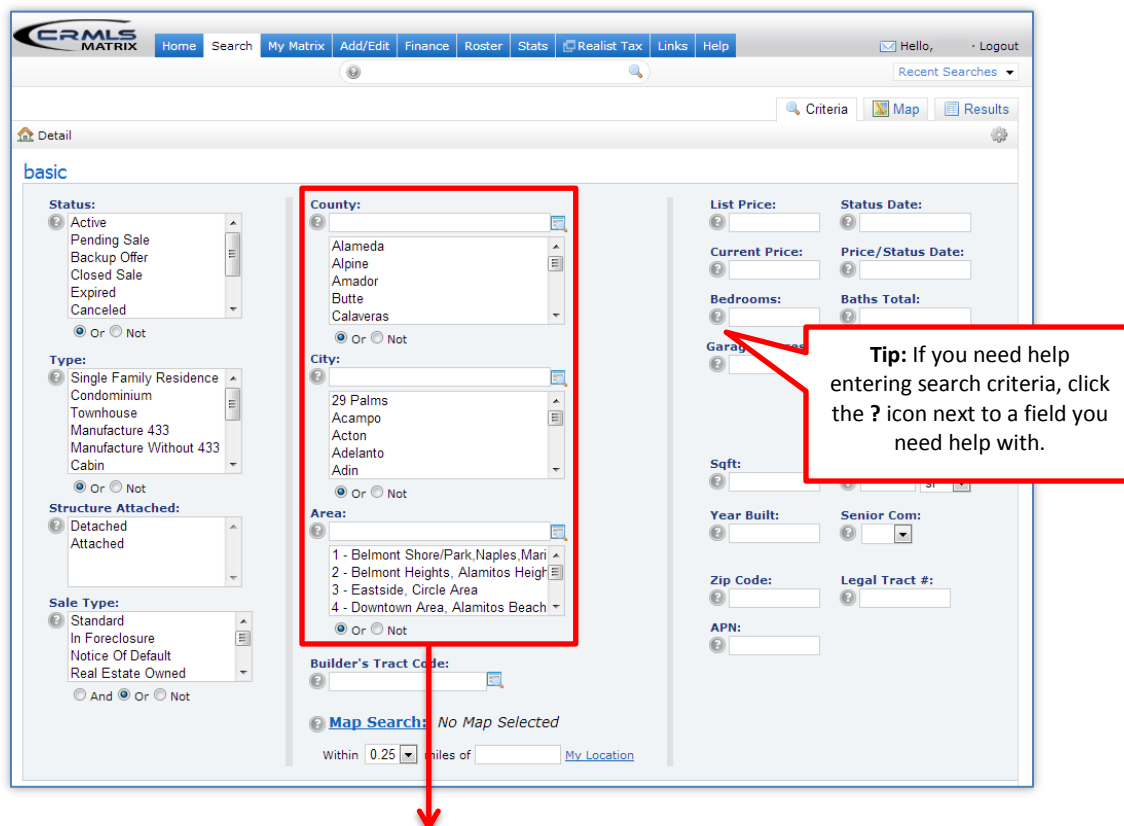
1. The Matrix platform's navigation menu bar allows you to access the search features in several ways. When you hover over the search tab you will see a drop down menu from which you can select the type of search you want to run.



Alternatively, you may click on the search tab itself to view all the search options on one screen such as in the picture below.



2. After you have selected the property type you want to search for (such as Residential Detail), input the search criteria you are interested in searching for.

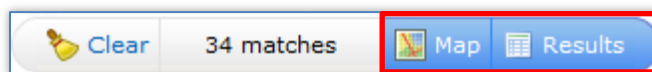


To limit the City field to displaying cities in a particular county, select a county in the County field. Similarly, to limit the Area field to displaying areas in a particular city, select a city in the City field.

To select multiple counties, cities or areas at once, type a comma separated list of cities in the search field for each category desired.

You can also select multiple cities by holding down the control key in Windows or the command key on a Mac and clicking the cities you want to select in the city list field.

3. To generate the search results, you can click on either the Map or Results tab in the upper right hand corner of the screen or on the Map or Results button at the bottom of the screen. The results page will be discussed later in this manual.



**Note:** The live count button will show you how many listings match your search criteria.

## ADDITIONAL SEARCH OPTIONS

Refer to the table below for a list of special characters allowed for search fields.

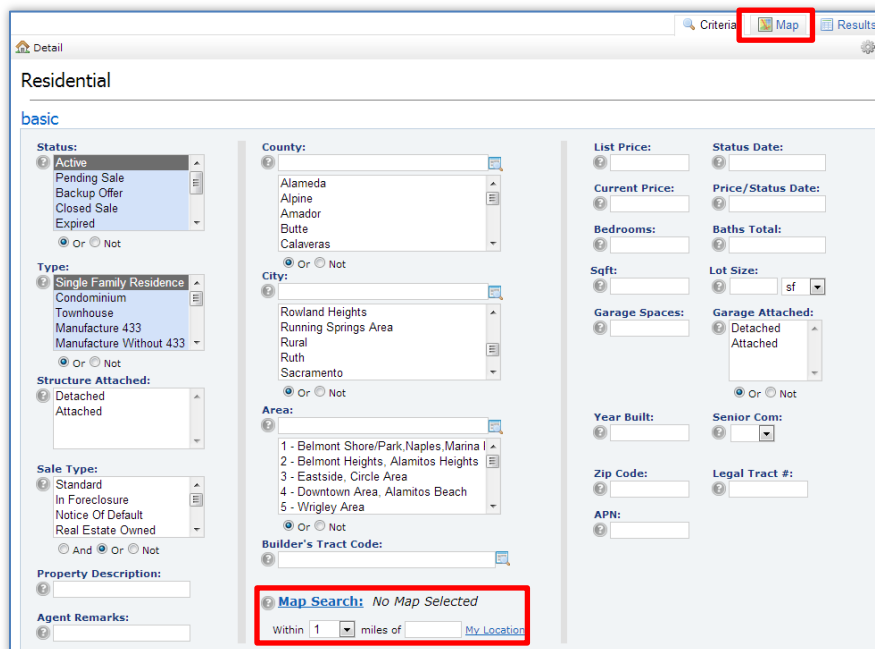
Special Character	Description	Example
+	<b>Greater than or equal to:</b> Allows you to search for values that are greater than or equal to the value you entered. When using the + character, it must follow the value you enter.	<i>Bathrooms: 3+</i> Finds all listings that have 3 or more bathrooms.
-	<b>Less than or equal to:</b> Allows you to search for values that are less than or equal to the value you entered. When using the - character, it must follow the value you enter.	<i>Bathrooms: 4-</i> Finds all listings that have 4 bathrooms or less.
-	<b>Range:</b> Allows you specify a numeric range.	<i>List Price: 150000-200000</i> Finds all listings with a list price ranging from \$150,000 to \$200,000.
,	<b>Either/Or:</b> Allows you to enter multiple values in a single field.	<i>Area: 689, 690</i> Finds all listings that are located in either area 689 or 690.
*	<b>Wildcard:</b> Searches for unknown letters and/or numbers.	<i>Street Name: *Park</i> Finds all listings that are located on a street that ends with the word Park.  <i>Street Name: Park*</i> Finds all listings that are located on a street that begins with the word Park.  <i>Property Description/Agent comments: *key word*</i> Finds all listings with the "key word" in the property description or office comments. Use commas to separate multiple key words.
!	<b>Exclude Selections:</b> Allows you to exclude listings that contain a specific value for search criteria. When using the ! character, it must precede the value you enter.	<i>Year Built: !*1960*</i> Excludes all listings that contain properties that were built in 1960.



## MAP SEARCH

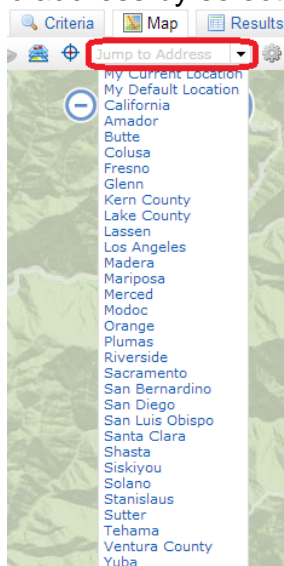
Follow the steps below to search for properties within a selected area on a map.

1. On the Matrix home page, click on the **Search** tab and select the Detail or Quick search according to property type. Once you are on the search page, input your search criteria (excluding a County, City or Area) then click on the **Map** tab or the **Map Search** link.

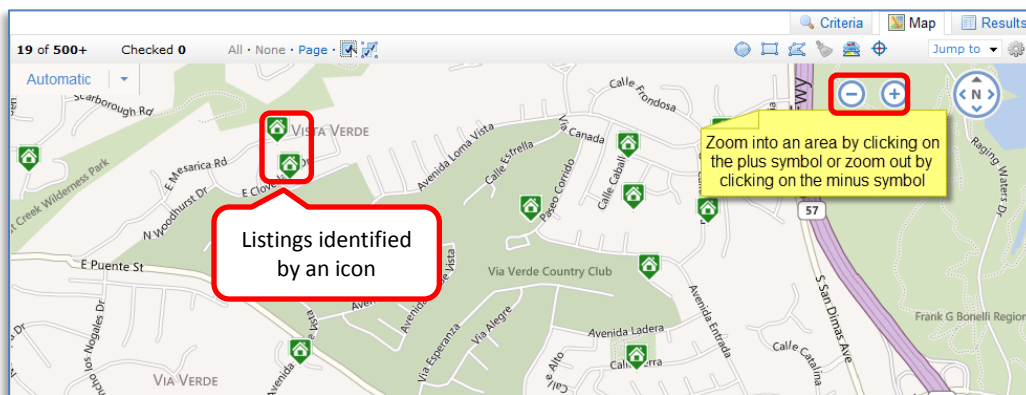


The screenshot shows the CRMLS search interface with the 'Map' tab selected. The 'Map Search' link is highlighted in a red box. The interface includes various search criteria fields such as Status, Type, Structure Attached, Sale Type, Property Description, Agent Remarks, County, City, Area, List Price, Current Price, Bedrooms, Sqft, Garage Spaces, Year Built, Zip Code, APN, Status Date, Price/Status Date, Baths Total, Lot Size, Garage Attached, and Senior Com. The 'Map Search' link is located at the bottom of the search criteria section.

2. To move the map to a specific county, select the county from the drop down **Jump to** menu. Or you can move the map to a city or specific address by selecting **Address** from the list.

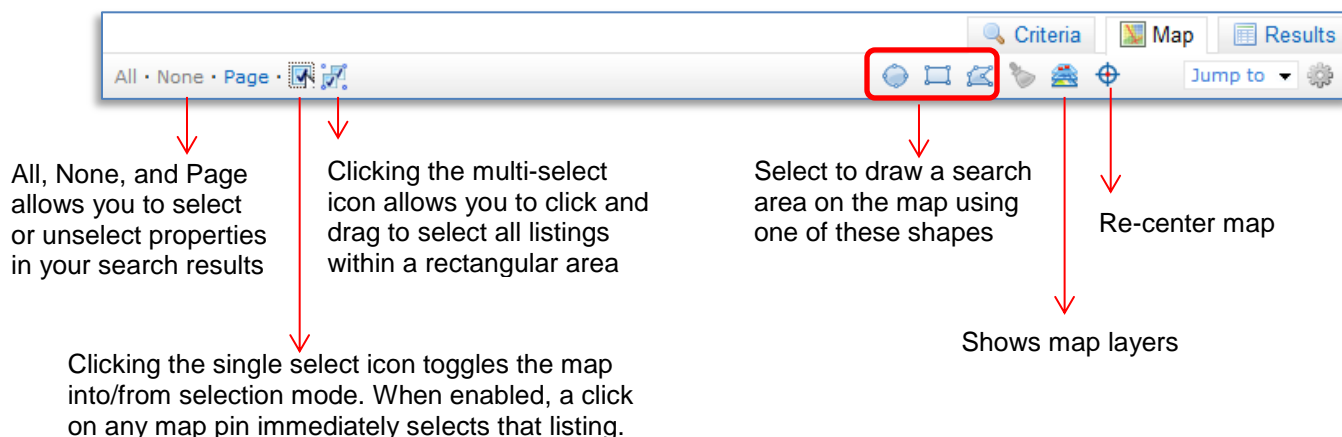


3. Click and hold on the map as you move your mouse in order to pan the view and locate an area for searching. You can also zoom into or out of an area by using the controls on the map as displayed below. The listings will auto-populate and will be identified by a pin in the map.

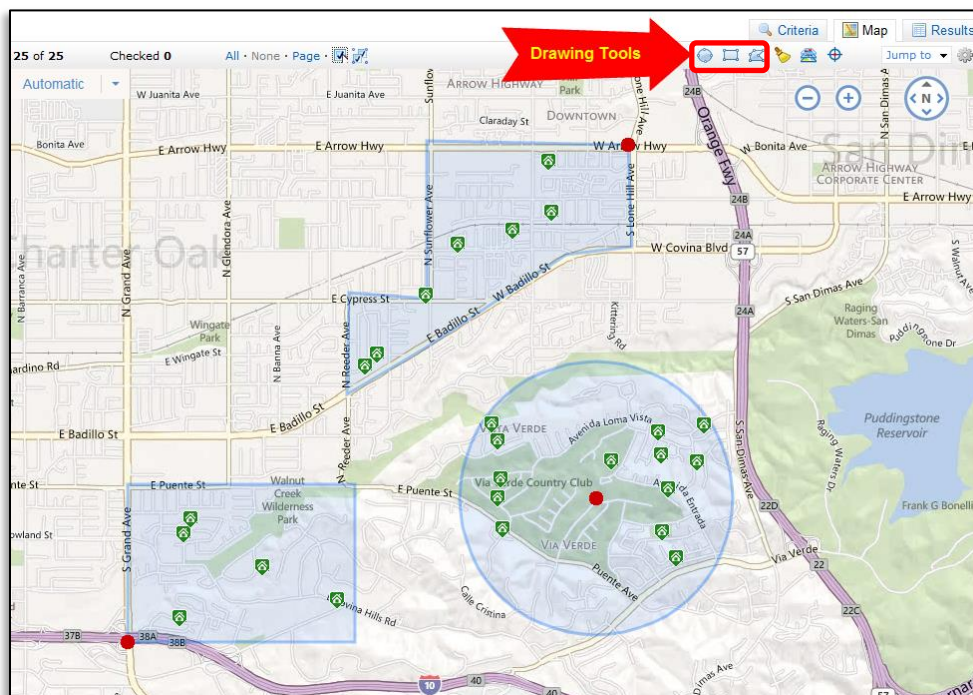


### MAP SEARCH TOOL BAR

The map search tool bar includes a robust selection of tools to maximize efficiency when working with the map.



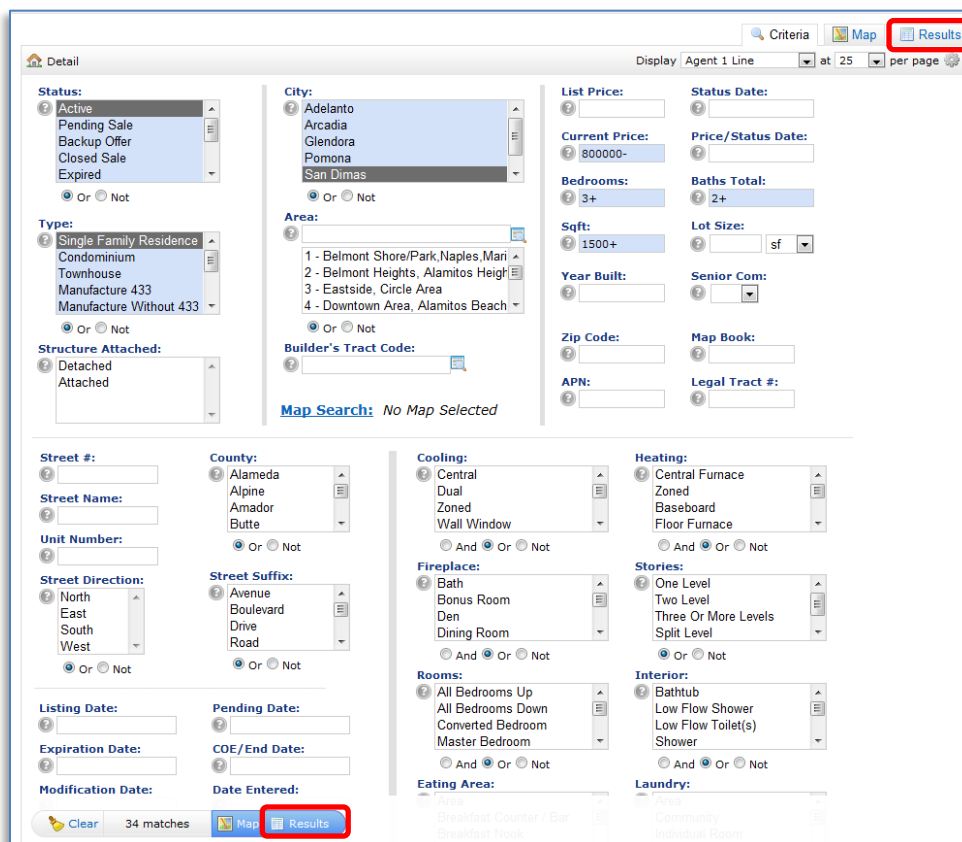
4. Use the drawing tools to select a search region on the map by drawing boundaries around the desired areas. You can choose to draw a radius, rectangle, or a polygon. Examples of all three are shown below.



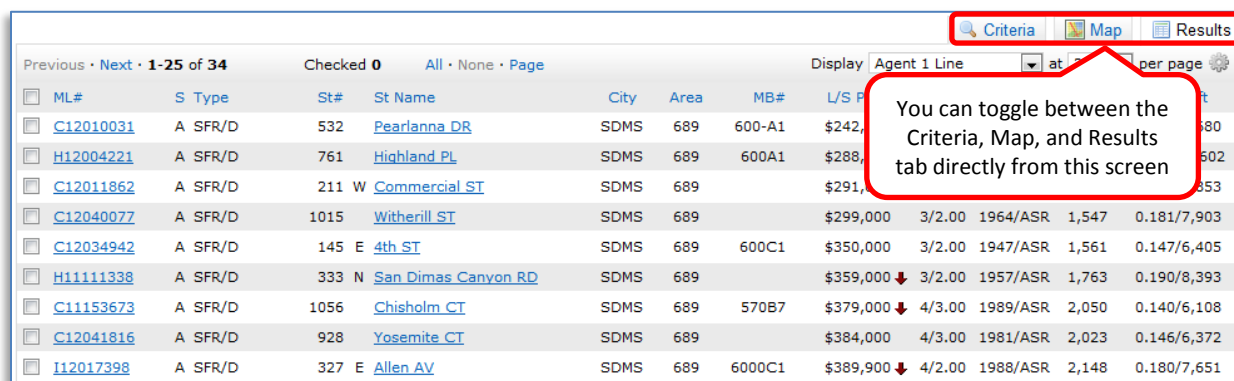
**Note:** When using the map search, do not select a city or MLS area in the basic search criteria page as this may conflict with the search regions you draw and could result in no listing matches.

## VIEWING SEARCH RESULTS

From the **Search page**, click on the **Results** tab or the **Results** button.



Once you generate the **Results**, Matrix will display a search result window like this one:



ML#	S Type	St#	St Name	City	Area	MB#	L/S F	Price
C12010031	A SFR/D	532	Pearlanna DR	SDMS	689	600-A1		\$242,000
H12004221	A SFR/D	761	Highland PL	SDMS	689	600A1		\$288,000
C12011862	A SFR/D	211 W	Commercial ST	SDMS	689			\$291,000
C12040077	A SFR/D	1015	Wetherill ST	SDMS	689			\$299,000
C12034942	A SFR/D	145 E	4th ST	SDMS	689	600C1		\$350,000
H11111338	A SFR/D	333 N	San Dimas Canyon RD	SDMS	689			\$359,000
C11153673	A SFR/D	1056	Chisholm CT	SDMS	689	570B7		\$379,000
C12041816	A SFR/D	928	Yosemite CT	SDMS	689			\$384,000
I12017398	A SFR/D	327 E	Allen AV	SDMS	689	6000C1		\$389,900









## SEARCH RESULTS LINKS, ICONS, AND DISPLAYS

Refer to the table below for a list of links, icons, and displays available on the search results window.

Link or Display	Description
<a href="#">Next</a>	Click the <b>Next</b> link to view the next page of search results.
<a href="#">Previous</a>	Click the <b>Previous</b> link to view the previous page of search results.
<a href="#">All, None, Page</a>	Click the <b>All, None, or Page</b> link to quickly select/un-select all listings on the search results page
<a href="#">1</a> [2] <a href="#">3</a> <a href="#">4</a> <a href="#">5</a> <a href="#">6</a> <a href="#">7</a>	Click a <b>number</b> to jump to that page of search results. For example, click <b>2</b> to view the second page of search results. The number in brackets indicates the current search results page that you're viewing.
Listing # <a href="#">P123456</a>	Click the <b>listing number</b> link to view the full listing.
St Name (Map) <a href="#">Main St</a>	Click the <b>street name</b> to view the listing on a map.
<a href="#">DOM/CDOM</a>	Click the <b>DOM</b> link to view a history of the listing or the <b>CDOM</b> link to view a comprehensive listing history of the property. The history will include price changes, status changes, selling office compensation changes, and the User ID of the changing agent or entity.  <b>Note:</b> <i>To view property history by APN and/or Street Address, click the <b>Property History</b> link on the Search tab.</i>
Display	Select a display format from the <b>Display</b> drop down box to change the search results display one of the various display formats available.  <b>Note:</b> <i>You can change the default result display on the search page only. You can also change your listings per page from 25 to 10, 50, or 100.</i>
Criteria	The search criteria you selected is displayed at the bottom left side of the search results window.

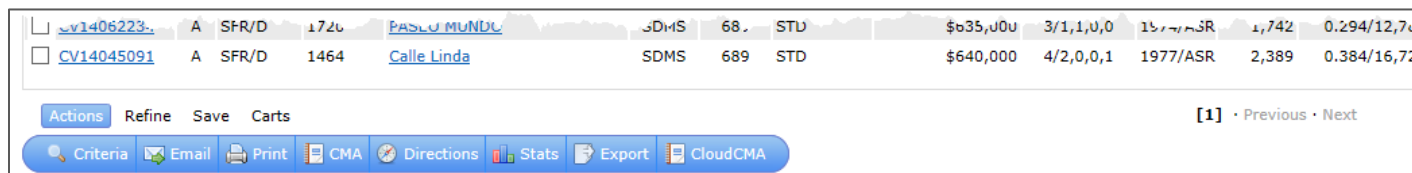
## SEARCH RESULTS ICONS

Refer to the table below for a list of icons available on the search results window.

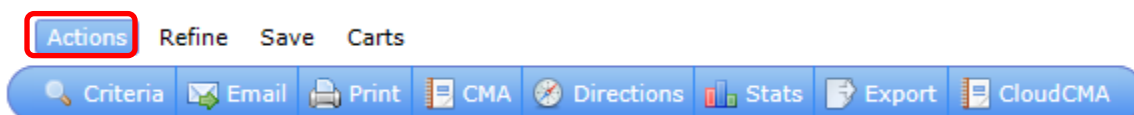
Icon	Description
	Click the selection box for each listing you would like to Narrow, Discard, Save, Sort, Print, Export, Email, or Map.
	Indicates that either the list price or sale price has changed. The <b>up arrow</b> means that the list price or sale price has increased and the <b>down arrow</b> means that the list or sale price has decreased. To view the listing's history, click the <b>DOM</b> or <b>CDOM</b> link.
	Click the <b>portrait</b> icon to view the photo(s) for this listing. Listings with a portrait icon with a plus in the upper right hand corner indicate that there are multiple photos available for that listing.
	Click the <b>map</b> icon to view the listing on a map.
	Click the <b>Assessors Map</b> icon to view the plot map of the listing.
	Click the <b>Realist Tax</b> icon to open the listing in Realist Tax. Realist Tax combines public records, CRMLS listing data, maps, and market data in to a single research tool.
	Click the <b>binoculars</b> icon to add the listing to your Watched Listings. To access your watched listings, click the <b>Watched Listings</b> link in the <b>My Matrix</b> tab, or via the <b>Watched Listings Widget</b> on the <b>Home</b> tab.
	Click the <b>virtual tour</b> icon to view the external virtual tour website for this property.

## SEARCH RESULTS BUTTONS

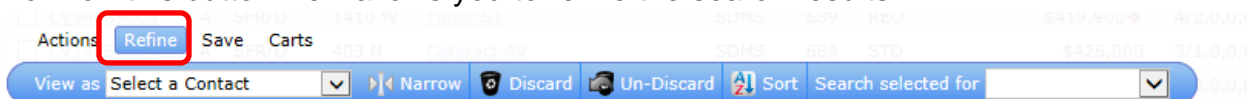
The Matrix features a consolidated task driven button bar. Buttons are grouped together by tasks for actions that can be performed while viewing listing search results. The button bar remains consistent across results page and map views. Page navigation links are located on the lower right side of the page.



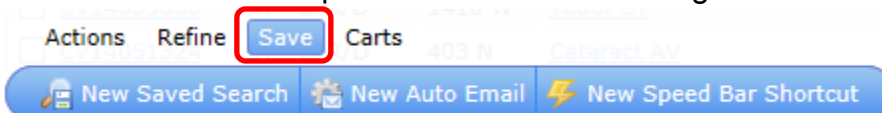
- 1) **Actions** - this default button view contains all primary actions you will perform with results.



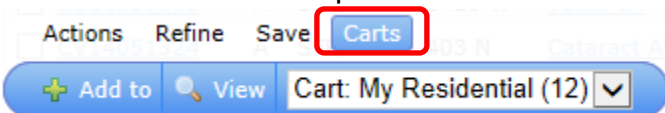
- 2) **Refine** - this button view allows you to refine the search results.



- 3) **Save** - this button view provides access to creating all the "Save" features.



- 4) **Carts** - this button view provides access to all cart actions.



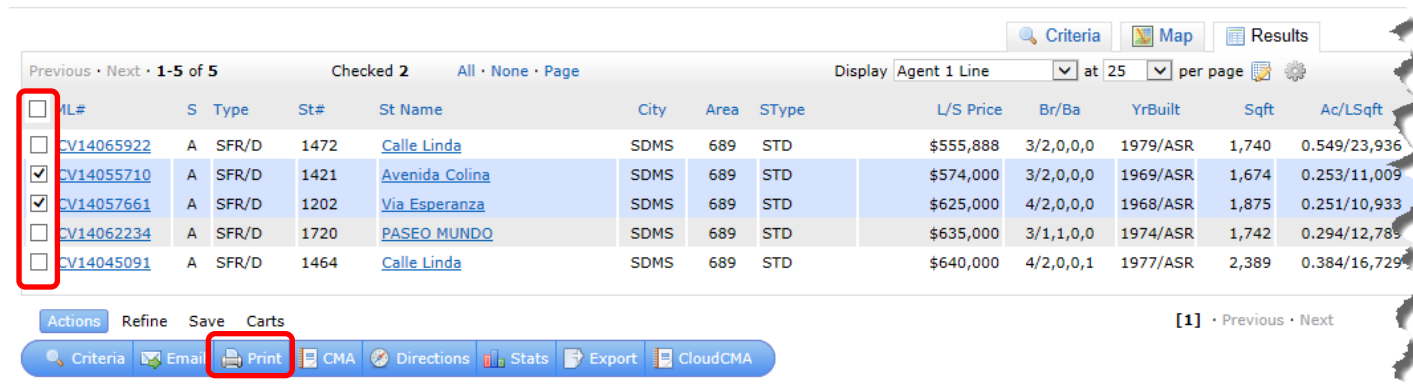


## PRINTING LISTINGS AND REPORTS

Follow the steps below to print listings and reports. Before you begin, make sure that you've performed a search as described in the [Searching for Listings](#) section of this manual.

### PRINTING FROM SEARCH RESULTS

From the search results screen, select one or more properties by clicking the selection boxes next to each listing. Then, under the default **Actions** menu bar, click the blue **Print** button.



Previous · Next · 1-5 of 5      Checked 2      All · None · Page      Display Agent 1 Line at 25 per page

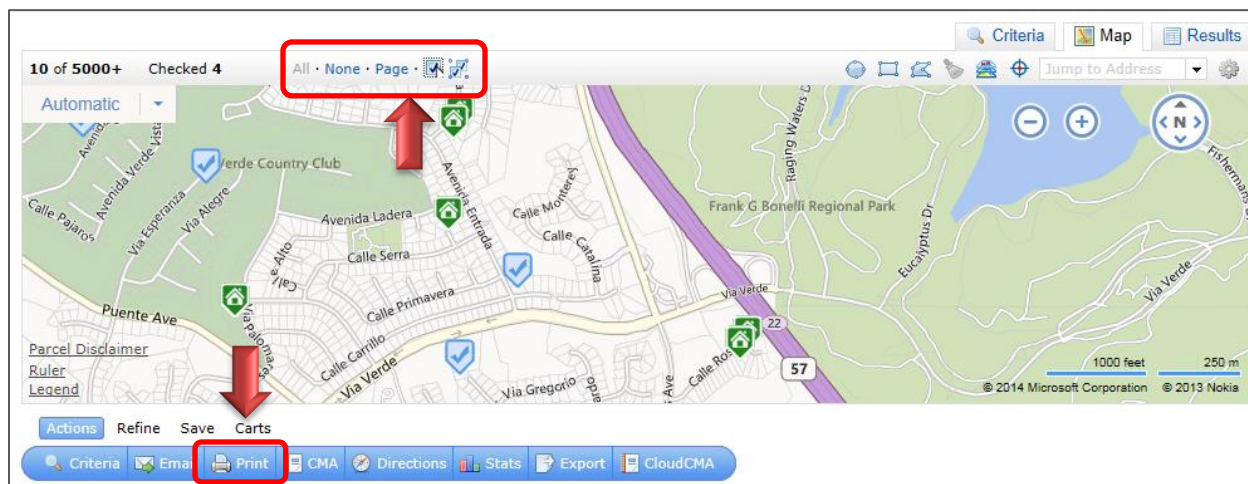
<input type="checkbox"/>	ML#	S	Type	St#	St Name	City	Area	SType	L/S Price	Br/Ba	YrBuilt	Sqft	Ac/LSqft
<input type="checkbox"/>	CV14065922	A	SFR/D	1472	Calle Linda	SDMS	689	STD	\$555,888	3/2,0,0,0	1979/ASR	1,740	0.549/23,936
<input checked="" type="checkbox"/>	CV14055710	A	SFR/D	1421	Avenida Colina	SDMS	689	STD	\$574,000	3/2,0,0,0	1969/ASR	1,674	0.253/11,009
<input checked="" type="checkbox"/>	CV14057661	A	SFR/D	1202	Via Esperanza	SDMS	689	STD	\$625,000	4/2,0,0,0	1968/ASR	1,875	0.251/10,933
<input type="checkbox"/>	CV14062234	A	SFR/D	1720	PASEO MUNDO	SDMS	689	STD	\$635,000	3/1,1,0,0	1974/ASR	1,742	0.294/12,789
<input type="checkbox"/>	CV14045091	A	SFR/D	1464	Calle Linda	SDMS	689	STD	\$640,000	4/2,0,0,1	1977/ASR	2,389	0.384/16,729

Actions Refine Save Carts      [1] · Previous · Next

Criteria Email **Print** CMA Directions Stats Export CloudCMA

### PRINTING FROM THE MAP

From the search results map screen, select one or more properties by using the **single** or **multi select** icon tool. Then, under the default **actions** menu bar, click the blue **Print** button.



10 of 5000+      Checked 4      All · None · Page      Jump to Address

Automatic

Parcel Disclaimer  
Ruler  
Legend

Actions Refine Save Carts      [1] · Previous · Next

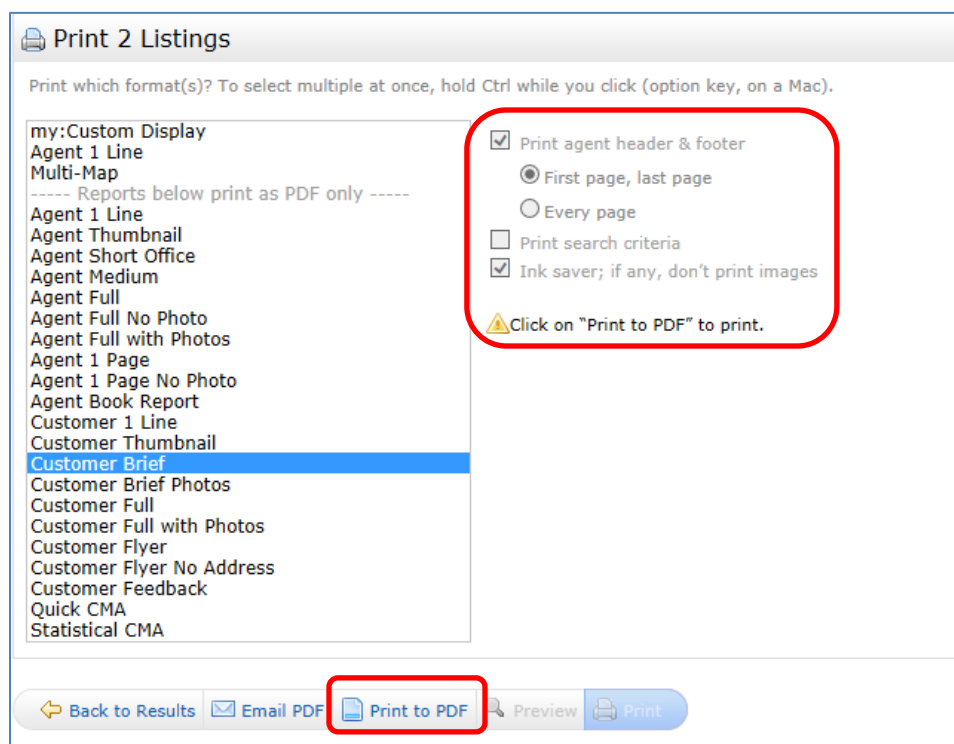
Criteria Email **Print** CMA Directions Stats Export CloudCMA



### GENERATING THE PDF FILE(S)

After clicking the **Print** button, you will be presented with a selection of reports to choose from.

You can select one or more reports to print by holding down the “CTRL” key on the keyboard as you make your selection. Please note that you will need to have Adobe Acrobat Reader installed on your computer. If you need to install this program, you may download a free copy from Adobe by visiting: <http://get.adobe.com/reader/>



**Print 2 Listings**

Print which format(s)? To select multiple at once, hold Ctrl while you click (option key, on a Mac).

my:Custom Display  
Agent 1 Line  
Multi-Map  
----- Reports below print as PDF only -----  
Agent 1 Line  
Agent Thumbnail  
Agent Short Office  
Agent Medium  
Agent Full  
Agent Full No Photo  
Agent Full with Photos  
Agent 1 Page  
Agent 1 Page No Photo  
Agent Book Report  
Customer 1 Line  
Customer Thumbnail  
**Customer Brief**  
Customer Brief Photos  
Customer Full  
Customer Full with Photos  
Customer Flyer  
Customer Flyer No Address  
Customer Feedback  
Quick CMA  
Statistical CMA

☒ Print agent header & footer  
☒ First page, last page  
☐ Every page  
☐ Print search criteria  
☒ Ink saver; if any, don't print images

⚠ Click on "Print to PDF" to print.

Back to Results Email PDF **Print to PDF** Preview Print

*Note: Google Chrome users will be unable to print the agent header/footer on every page as Chrome is inconsistent with this command.*

### PRINTING PDF FILE(S)

If you've selected the **Print to PDF** feature, you will have the opportunity to save the listings to your computer as a PDF file, or print. Adobe Acrobat Reader will open and display the report in a PDF format. To print, click on the **print icon** or select **print** from the file menu of your browser. When done, close the window or tab to return to Matrix.

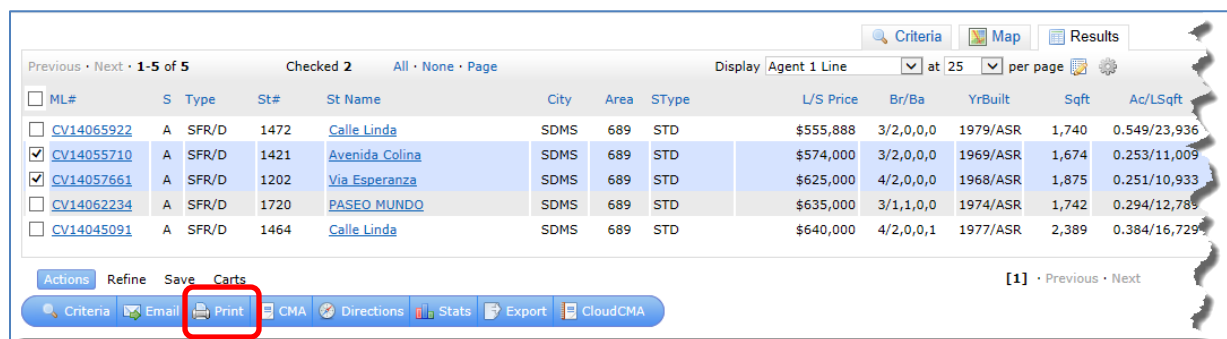
## EMAILING LISTINGS

The Matrix platform allows you to email listings as reports in PDF format. Listings can also be emailed as a hyperlink to a client portal so that your clients will receive the most up to date information for listings you have selected.

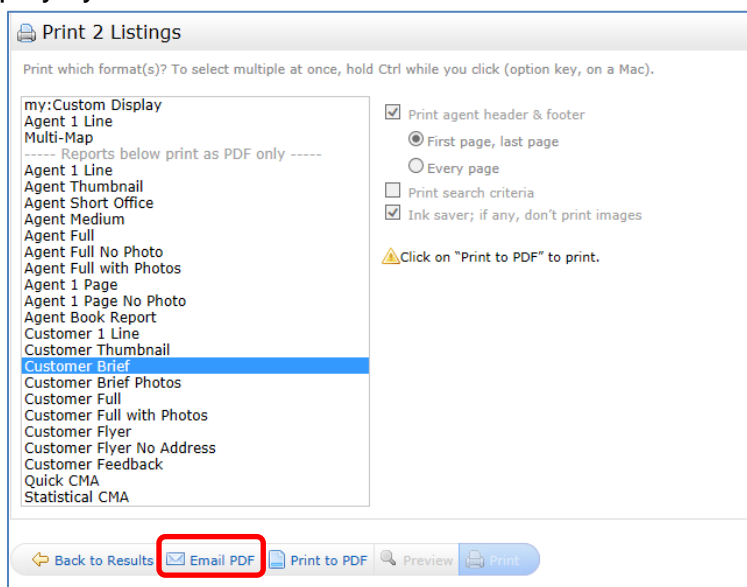
## EMAILING LISTINGS AS REPORTS

Follow the steps below to email listings as a PDF report. Before you begin, make sure that you've performed a search as described in the "Searching for Listings" section of this manual.

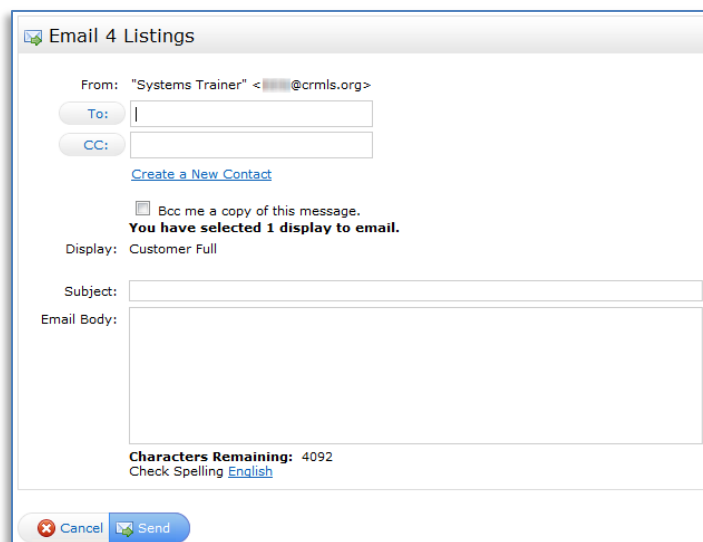
1. Click the check box next to each listing you want to include in the email.
2. Click the **Print** button.



3. Select any of the displays you want to email and then click the **Email PDF** button.



- Click the **To:** or **CC:** button to select a recipient from your contact list. You can also manually type your client's email address in the **To:** field. Separate multiple recipients by putting a semi-colon (;) after each entry.



The screenshot shows a web-based email composition window titled "Email 4 Listings". The "From:" field is pre-filled with "Systems Trainer" and an email icon. Below it are "To:" and "CC:" buttons, each followed by a text input field. A link "Create a New Contact" is positioned below the "CC:" field. A checkbox labeled "Bcc me a copy of this message." is present, with a confirmation message "You have selected 1 display to email." below it. The "Display:" field shows "Customer Full". There are "Subject:" and "Email Body:" text input fields. At the bottom, it says "Characters Remaining: 4092" with a "Check Spelling" link and "English" as the selected language. "Cancel" and "Send" buttons are at the very bottom.

**Note:** To select more than one contact in your contact list, hold down the **CTRL** key on your keyboard as you select them.

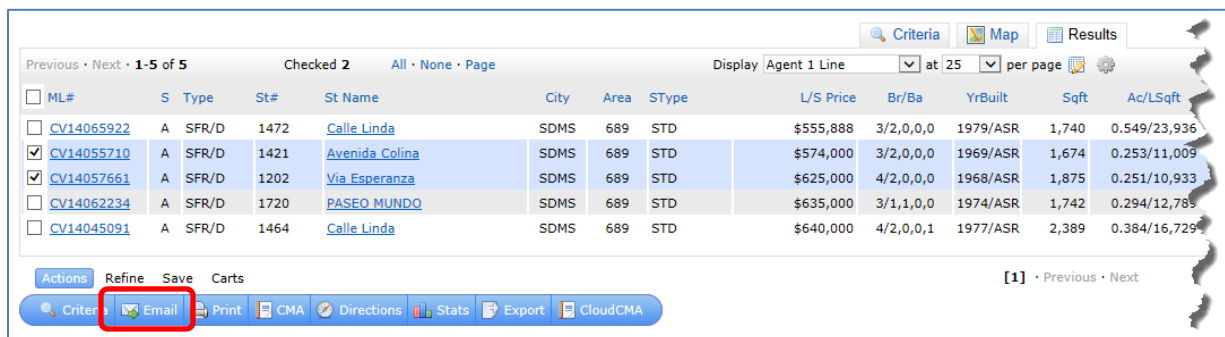
If your email address doesn't appear in the **From:** field, you will need to add your email address to your account (see the "Updating Your Contact Information" section in this manual for details).

- Click the **Bcc me a copy of this message** checkbox to receive a copy of the email you're sending.
- Enter a subject for the email in the **Subject** field.
- Enter a message for your client in the **Email Body** field.
- Click the **English** link to spell check the message you typed in the Email Body field.
- Click the **Send** button to email the selected report to your client in PDF format.

## EMAILING LISTINGS AS LINKS

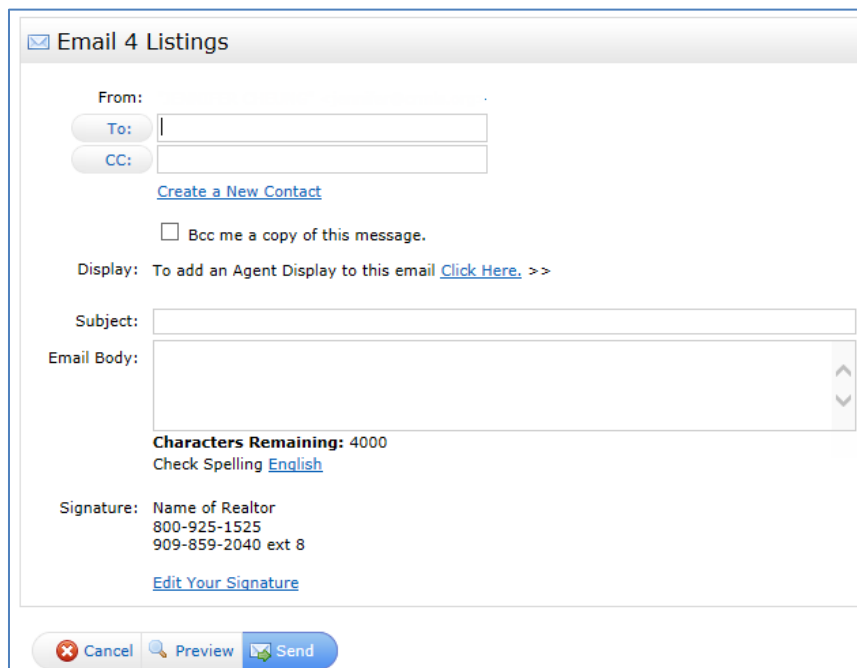
Follow the steps below to email listings as links. Before you begin, make sure that you've performed a search as described in the "Searching for Listings" section on page 13 this manual.

1. Click the check box next to each listing you want to include in the email.
2. Click the **Email** button.



ML#	S	Type	St#	St Name	City	Area	SType	L/S Price	Br/Ba	YrBuilt	Sqft	Ac/LSqft
<input type="checkbox"/> CV14065922	A	SFR/D	1472	Calle Linda	SDMS	689	STD	\$555,888	3/2,0,0,0	1979/ASR	1,740	0.549/23,936
<input checked="" type="checkbox"/> CV14055710	A	SFR/D	1421	Avenida Colina	SDMS	689	STD	\$574,000	3/2,0,0,0	1969/ASR	1,674	0.253/11,009
<input checked="" type="checkbox"/> CV14057661	A	SFR/D	1202	Via Esperanza	SDMS	689	STD	\$625,000	4/2,0,0,0	1968/ASR	1,875	0.251/10,933
<input checked="" type="checkbox"/> CV14062234	A	SFR/D	1720	PASEO MUNDO	SDMS	689	STD	\$635,000	3/1,1,0,0	1974/ASR	1,742	0.294/12,789
<input type="checkbox"/> CV14045091	A	SFR/D	1464	Calle Linda	SDMS	689	STD	\$640,000	4/2,0,0,1	1977/ASR	2,389	0.384/16,729

3. Click the **To:** or **CC:** button to select a recipient from your contact list. You can also manually type your client's email address in the **To:** field. Separate multiple recipients by typing a semi-colon (;) after each email address.



**Email 4 Listings**

From: [Field]

To: [Field]

CC: [Field]

[Create a New Contact](#)

☐ Bcc me a copy of this message.

Display: To add an Agent Display to this email [Click Here](#). >>

Subject: [Field]

Email Body: [Field]

**Characters Remaining:** 4000  
Check Spelling [English](#)

Signature: Name of Realtor  
800-925-1525  
909-859-2040 ext 8  
[Edit Your Signature](#)

**Note:** To select more than one contact in your contact list, hold down the **CTRL** key on your keyboard as you select them.

4. Click the **"Bcc me a copy of this message"** checkbox to receive a copy of the email you're sending.
5. Enter a subject for the email in the **Subject** field.
6. Enter a message for your client in the **Email Body** field.
7. Click the **English** link to spell check the message you typed in the email body field.
8. Click the **Preview** button to preview how the properties will appear to your recipient once they click on the link contained in their email.





**Systems Trainer**  
California Regional MLS

Office: 800-925-1525  
Fax: 909-859-2050

These Listings were manually emailed to you on Wednesday, June 20, 2012 9:31 AM.

1-4 of 4

[1] • Previous • Next • Bottom

<input type="checkbox"/>	Received	ML#	Status	St#	Street Name	City	Area	MB#	L/S Price	CDOM	Br/Ba	Sqft	Built
<input type="checkbox"/>		<a href="#">F12038025</a>	Active	331	W Baseline RD	SDMS	689		\$220,000	18	3/1	1,393 (A)	1952/ASR
<input type="checkbox"/>		<a href="#">M12027225</a>	Active	305	W 3rd St	SDMS	689		\$250,000	41	2/1	840 (A)	1925/ASR
<input type="checkbox"/>		<a href="#">22160412</a>	Active	117	W COMMERCIAL ST	SDMS	689	600B2	\$279,500 ↓	84	2/1	960 (P)	1912/ASR
<input type="checkbox"/>		<a href="#">C12034052</a>	Active	1240	Hidden Creek RD	SDMS	689	570A6	\$290,000 ↓	27	3/3	1,321 (A)	1987/ASR

[1] • Previous • Next • Top

Print Map

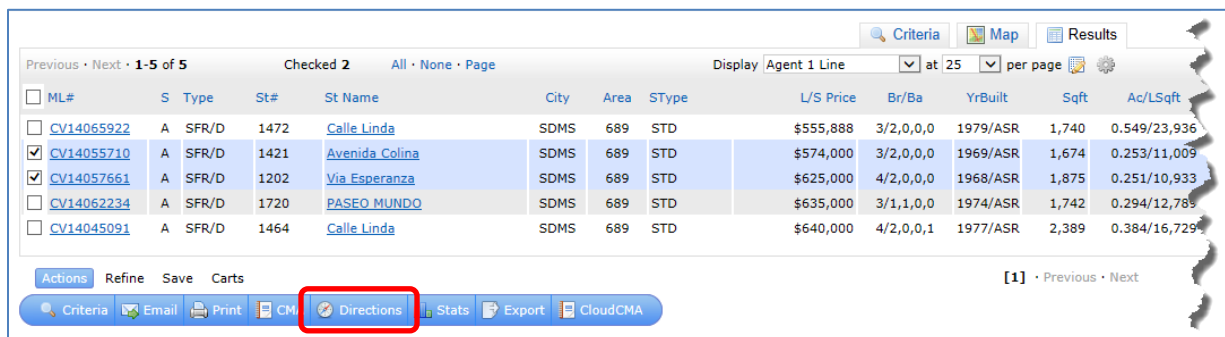
Display: Public - 1 Line at 10 per page.

9. Click the **Send** button to email the selected listings as links to your client.

## DRIVING DIRECTIONS

Follow the steps below to get driving directions for listings. Before you begin, make sure that you've performed a search as described in the "Searching for Listings" section on page 13 this manual.

1. Click the check box next to each listing you want to display on a map.
2. Click the **Directions** button.

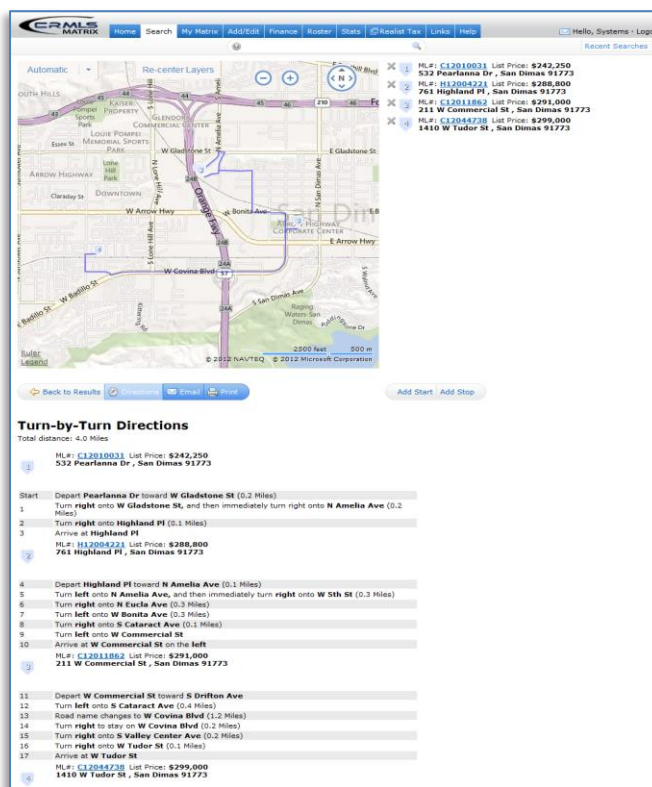


ML#	S	Type	St#	St Name	City	Area	SType	L/S Price	Br/Ba	YrBuilt	Sqft	Ac/LSqft
<input type="checkbox"/> CV14065922	A	SFR/D	1472	Calle Linda	SDMS	689	STD	\$555,888	3/2,0,0,0	1979/ASR	1,740	0.549/23,936
<input checked="" type="checkbox"/> CV14055710	A	SFR/D	1421	Avenida Colina	SDMS	689	STD	\$574,000	3/2,0,0,0	1969/ASR	1,674	0.253/11,009
<input checked="" type="checkbox"/> CV14057661	A	SFR/D	1202	Via Esperanza	SDMS	689	STD	\$625,000	4/2,0,0,0	1968/ASR	1,875	0.251/10,933
<input checked="" type="checkbox"/> CV14062234	A	SFR/D	1720	PASEO MUNDO	SDMS	689	STD	\$635,000	3/1,1,0,0	1974/ASR	1,742	0.294/12,789
<input type="checkbox"/> CV14045091	A	SFR/D	1464	Calle Linda	SDMS	689	STD	\$640,000	4/2,0,0,1	1977/ASR	2,389	0.384/16,729

Actions: Refine Save Carts

Criteria Email Print CM **Directions** Stats Export CloudCMA

You will see a map similar to this one with the selected listings.



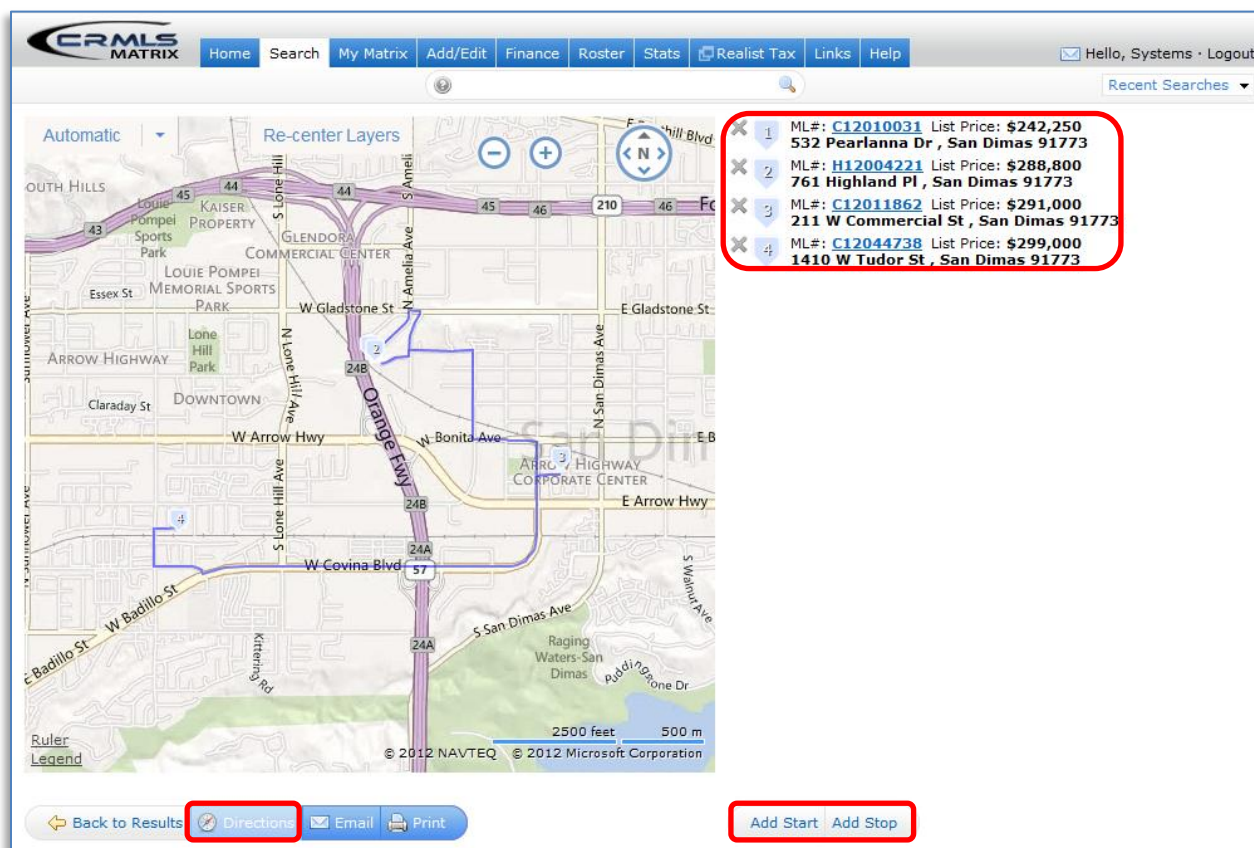
**Turn-by-Turn Directions**  
Total distance: 4.0 Miles

ML# C12010031 List Price: \$242,250  
532 Pearlanna Dr, San Dimas 91773

1. Depart Pearlanna Dr toward W Gladstone St (0.2 Miles)
2. Turn right onto W Gladstone St, and then immediately turn right onto N Amelia Ave (0.2 Miles)
3. Turn right onto Highland Pl (0.1 Miles)
4. Arrive at Highland Pl
5. Depart Highland Pl toward N Amelia Ave (0.1 Miles)
6. Turn left onto N Amelia Ave, and then immediately turn right onto W 5th St (0.3 Miles)
7. Turn left onto N Euclid Ave (0.3 Miles)
8. Turn right onto W Covina Ave (0.3 Miles)
9. Turn left onto W Commercial St
10. Arrive at W Commercial St on the left
11. Depart W Commercial St toward S Driftwood Ave
12. Turn left onto S Cataract Ave (0.4 Miles)
13. Road name changes to W Covina Blvd (1.2 Miles)
14. Turn right to stay on W Covina Blvd (0.2 Miles)
15. Turn right onto S Valley Center Ave (0.2 Miles)
16. Turn right onto W Tudor St (0.1 Miles)
17. Arrive at W Tudor St
18. ML# C12048738 List Price: \$299,000  
1410 W Tudor St, San Dimas 91773

3. From the driving directions screen, you can do the following:
  - a. Click **Add Start** or **Add Stop** to add a starting or stopping location.
  - b. Click and drag a listing above or below another listing to change the order.
  - c. Click the **X** next to a listing to remove it from the list.

When you're done adding starting and stopping locations, changing the order of the listings, or removing listings, click the **Directions** button again to update the driving directions.



CRMLS MATRIX

Home Search My Matrix Add/Edit Finance Roster Stats Realist Tax Links Help

Hello, Systems · Logout

Recent Searches

Automatic Re-center Layers

1 ML#: [C12010031](#) List Price: \$242,250  
532 Pearlanna Dr, San Dimas 91773

2 ML#: [H12004221](#) List Price: \$288,800  
761 Highland Pl, San Dimas 91773

3 ML#: [C12011862](#) List Price: \$291,000  
211 W Commercial St, San Dimas 91773

4 ML#: [C12044738](#) List Price: \$299,000  
1410 W Tudor St, San Dimas 91773

Back to Results Directions Email Print

Add Start Add Stop

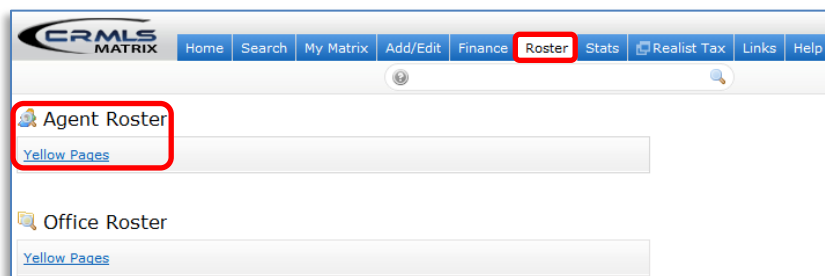


## SEARCHING FOR AGENTS AND OFFICES

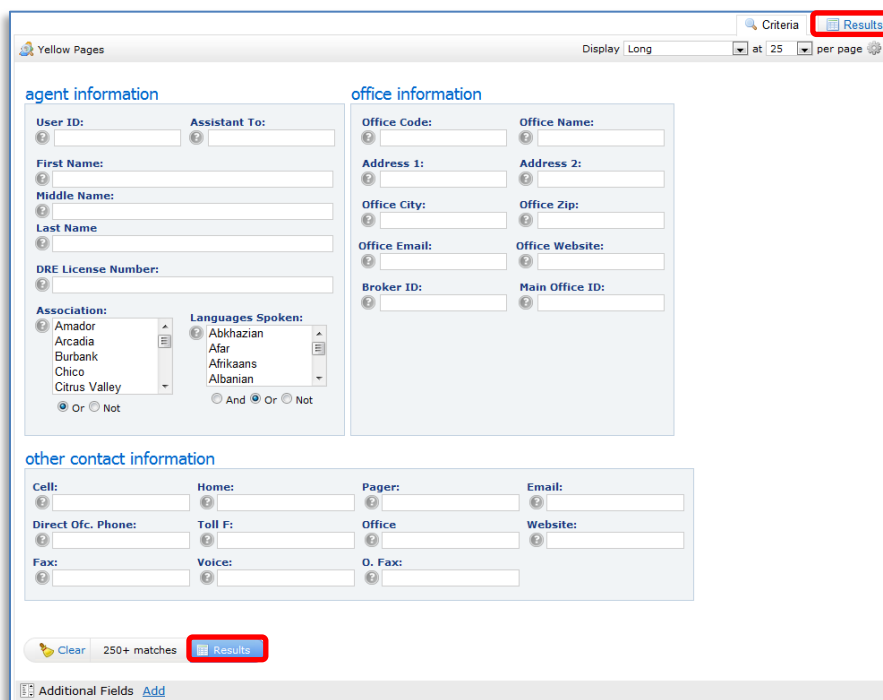
The Matrix Platform's **Roster** allows you to search for Agents and Offices that are part of the CARETS database. Follow the steps in these sections to search for Agents and Offices.

### SEARCHING FOR AGENTS

1. Click the **Roster** tab.
2. Click the **Yellow Pages** link under the Agent Roster section.



3. Enter your search criteria using the available fields.
4. Click the **Results** button or tab to display a list of agents that match your search criteria.  
*Tip: Use an asterisk (\*) after a partial first or last name to search for any first or last names beginning with the letters entered before the asterisk (\*).*



Yellow Pages

Display: Long at 25 per page

**agent information**

User ID: Assistant To:

First Name: Middle Name: Last Name:

DRE License Number:

Association: Languages Spoken:

Or Not And Or Not

**office information**

Office Code: Office Name:

Address 1: Address 2:

Office City: Office Zip:

Office Email: Office Website:

Broker ID: Main Office ID:

**other contact information**

Cell: Home: Pager: Email:

Direct Ofc. Phone: Toll F: Office Website:

Fax: Voice: O. Fax:

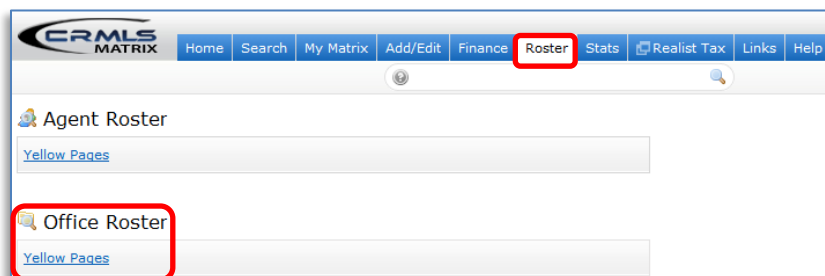
Clear 250+ matches Results

Additional Fields Add



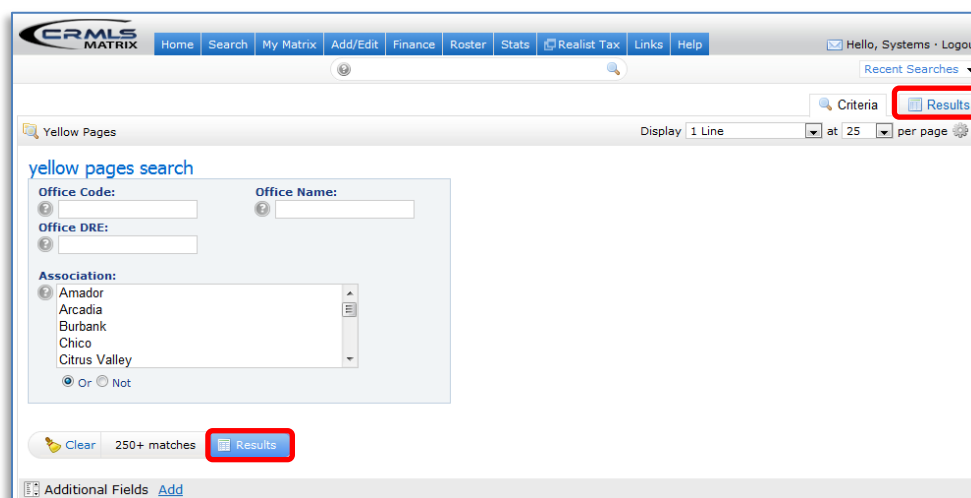
### SEARCHING FOR OFFICES

1. Click the **Roster** tab.
2. Click the **Yellow Pages** link under the Offices category.



3. Enter your search criteria using the available fields.
4. Click the **Results** button or tab to display a list of agents that match your search criteria.

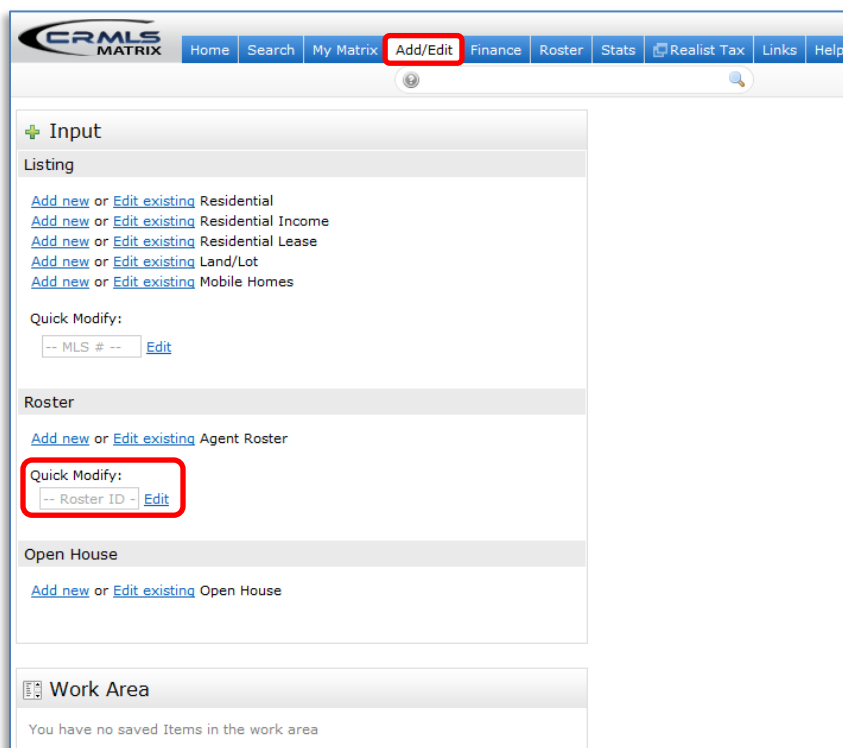
**Tip:** Use an asterisk (\*) after a partial office name to search for any offices beginning with the letters entered before the asterisk (\*).



### UPDATING YOUR CONTACT INFORMATION

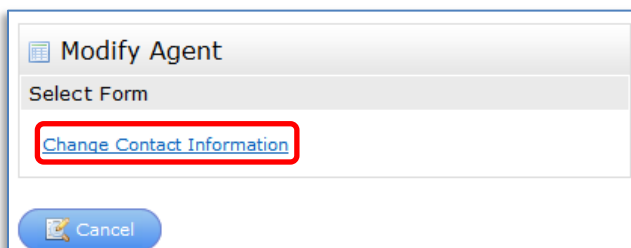
Your contact information is one of the most valuable pieces of information you can provide to CRMLS members. Matrix also displays your contact information on reports and displays. Follow the steps below to update your contact information or preferred contact order.

1. Click the **Add/Edit** tab.
2. Under the Roster section, type your Roster ID (MLS User ID) into the **Quick Modify** field, then click **Edit**.



The screenshot shows the CRMLS Matrix web application interface. The navigation bar at the top includes tabs for Home, Search, My Matrix, Add/Edit (highlighted with a red box), Finance, Roster, Stats, Realist Tax, Links, and Help. The main content area is divided into sections: Input, Listing, Quick Modify, Roster, Open House, and Work Area. Under the Roster section, the 'Quick Modify' field is highlighted with a red box, showing a dropdown menu with 'Roster ID' selected and an 'Edit' button next to it.

3. Click **Change Contact Information**.



The screenshot shows the 'Modify Agent' dialog box. The 'Select Form' dropdown menu is open, and 'Change Contact Information' is highlighted with a red box. A 'Cancel' button is visible at the bottom.

4. Update your contact information and preferred contact order using the available fields.
5. When you're done, click **Submit Agent** to save your updated contact information.

### + Change Contact Information

---

**Contact Information**

PublicID:xtrainerag Name:Systems Trainer

Direct Office Phone: <input type="text"/> 909-859-2040 ext <input type="text"/>  Home Phone: <input type="text"/> ext <input type="text"/>  Toll Free Phone: <input type="text"/> 800-925-1525 ext <input type="text"/>  Voicemail: <input type="text"/> ext <input type="text"/> 0  Email: <input type="text"/>  Website URL: <input type="text"/> www.crmls.org	Cell Phone: <input type="text"/>  Fax: <input type="text"/> 909-859-2050  Pager: <input type="text"/>
---	--

**Preferred Contact Order:**  
 The preferred contact order will control which phone numbers appear in the Roster. You may select up to 6 contact options. Selecting no contact options will leave only your office's phone and fax for other members to see.

1 <input type="text"/> Agent Cell Ph	4 <input type="text"/> Agent Fax
2 <input type="text"/> Agent Direct Ph	5 <input type="text"/> Agent Voice Mail
3 <input type="text"/> Agent Pager Ph	6 <input type="text"/> Agent Email

Cancel Input Submit Agent

### CRMLS SUPPORT RESOURCES

#### CRMLS WEBSITE

The CRMLS Central Site located at <http://www.crmls.org> contains the following tools and resources.

- [Rules and Policies](#)
  - [Carets Standardized Rules and Regulations](#)
  - [California Model Rules about Service Type](#)
  - [CARETS Data Integrity Standards](#)
- [Association Contacts](#)
- [Public Property Search](#)
- [Reciprocal User Information for CRMLS members and non-members](#)



## TRAINING RESOURCES

CRMLS takes pride in providing quality training materials and training resources to fit all of our member's schedules and individual learning styles. Training resources can be found by visiting <http://www.crmls.org> and clicking on the **TRAINING** button.



CRMLS offers the following types of training:

- **Instructor Led Classroom Training:** Classroom style training classes held at your local association. Check the training calendar for a list of available classes.
- **Hands on Training:** Classroom style training classes held at the CRMLS offices in San Dimas. Seating for these classes is limited, so be sure to sign up early.
- **Webinar Training (Web Conference):** On-line training classes that can be taken from the comfort of your home or office (requires high speed internet access).
- **Online Videos:** Learn at your own pace with our on demand video tutorials.
- **Product Documentation:** Download PDF copies of product manuals or download replacement training materials (requires Adobe reader 7.0 or later).

## CUSTOMER CARE

CRMLS Takes pride in providing expert customer care to all of our members. Our customer care technicians are prepared to assist you with any CRMLS Matrix Platform questions you may have, technical issues, or trouble shooting assistance.

To contact our technical support department, visit our website at <http://www.crmls.org> and click on the **SUPPORT** button. Then, click the **Submit Support Request or Suggestions** link to submit an online support request or suggestions (we value your suggestions).



If you need immediate assistance, our customer care technicians are available to answer your questions Monday through Friday from 8:30 a.m. to 9:00 p.m. and on Saturday and Sunday from 10:00 a.m. to 3:00 p.m.

Toll Free Number: **(800) 925-1525**

On the web: <http://www.crmls.org/support>

## APPENDIX

### SEARCHING FOR LISTINGS ON YOUR MOBILE DEVICES

CRMLS Mobile, powered by the Matrix Platform, allows you to search for Listings from your mobile devices. Follow the steps below to get started.

1. Open your mobile device's web browser and navigate to <http://www.crmlsmobile.com>
2. Enter your User ID and Password in the fields.
3. Click the Login button and start searching for listings.

**Note:** Access to CRMLS Mobile is free, however, your wireless carrier may charge extra for Internet data usage on your mobile device. Please contact your wireless carrier for Internet data rates and charges.





## ADDING A PUBLIC SEARCH LINK TO YOUR WEBSITE

Follow the steps below to add a public search link to your website.

1. Open your web browser and navigate to <http://www.crmls.org> and click **SUPPORT**.
2. On the support page, click **Link Generator**.



3. Enter your **Public ID** (MLS User ID) and **Office Code** in the available fields.  
*Note: if you don't know your Public ID or Office code, see the "Searching for Agents and Offices" section of this manual.*
4. Select a language(s) from the list of available languages.
5. Click the **Get Links** button.





CRMLS  
CALIFORNIA REGIONAL MULTIPLE LISTING SERVICE, INC.

TECHNOLOGY CT  
searching...

Click Here for a List of CRMLS Member Associations

RULES AND POLICIES  
ASSOCIATION CONTACTS  
PUBLIC PROPERTY SEARCH  
RECIPROCAL USER INFO.  
System Login Go

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- Highlight and then **copy and paste the text** of the generated code and email it to your website programmer in order to integrate it into your personal site.

**Note:** There are three available links for your website; a General Public Search, an Agent Listings Link, and an Office Listings link.

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===== Agent Listings =====  
 English  
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===== Office Listings =====  
 English  
<http://www.crmls.org/servlet/IDisplayListings?OFFICE=MRMLS&LA=EN>